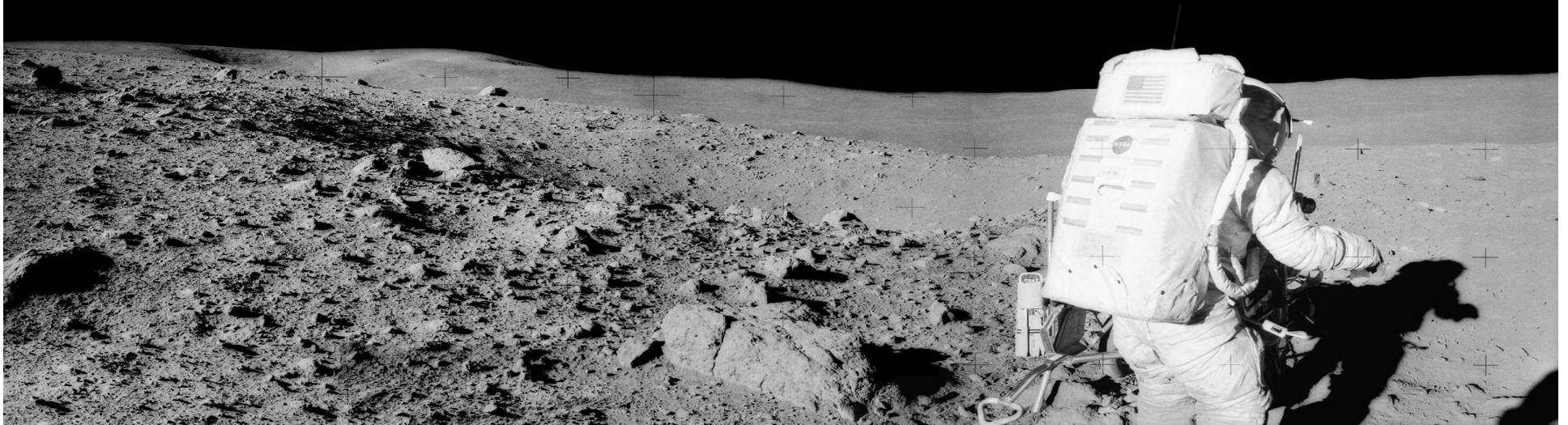# Project Management Approach to Source Evaluation Boards

Presented to: NASA Project Management Challenge

February 26-27, 2008

K. Lee Pagel and Vanessa Beene

- Discuss initiative at Johnson Space Center to align SEB processes to project management principles:
  - Sources of Feedback
  - Results of Feedback
  - The Project Cycle
  - Project Management Elements
    - Common Vocabulary
    - Teamwork
    - The Project Cycle
    - Requirements
    - Project Planning & Control
- Discuss other source selection initiatives currently underway at JSC
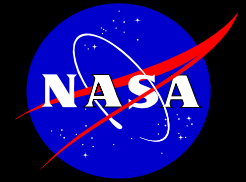
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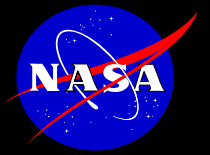
- The model for project management used in this presentation is taken from *Visualizing Project Management*, by Forsberg, Moog, and Cotterman.

- Receiving extensive feedback on Acquisition process:
  - Routine feedback sought from Industry at public events (Industry Day, Pre-proposal conferences)
  - Benchmarking activities with industry over the last year
  - Routine lessons learned gleaned from exiting SEB Chairs
  - Internal assessment from JSC Office of Analysis and Assessment (OAA) on Source Selection process and procurement processes
  - Included assessment by Booz Allen Hamilton, comparing JSC to other procuring organizations
  - Anonymous survey data from procurement employees
- Still digesting this enormous volume of information. Some highlights:
  - Early requirements definition critical
  - Schedule management needs work
  - Review process needs examination
- Knowledge capture initiative
  - Assign exiting COs after completion of source board to APAT for short period of time
    - Update templates, work instructions with latest experience
    - Assist in counseling incoming Chairs, COs on how-to info
  - Establishing lessons learned database
  - Considering ways to solicit lessons learned info real-time from Chairs and COs during SEB
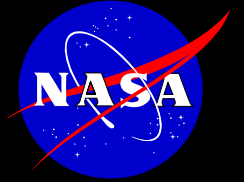
- SEB Chairs are schedule-focused, and process-frustrated
  – Process is unknown
  – Attempts to understand the process highlight the variations
  – Responsible for schedule, yet lacking control of stages of the process (like reviews)
- They expressed a strong desire for
  – Consistency
  – Templates of standard products
  – Some semblance of control over external activities
 – Understanding of the full cycle
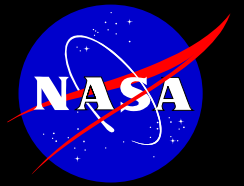
- Caveat – A lot of excellent work has already been done
- Since most SEB Chairs come from Project Management:
  - Visualized the SEB Cycle as a project
  - Considered our team, Acquisition Planning Advisory Team, as managers of a group of project managers
  - Modeled our role as:
    - Facilitators of the "Project" (SEB) Cycle
    - Owners of certain scarce resources
    - Owners of certain mandatory processes (FAR, Center Procedures)
    - Provider of tools, training, logistics, and experience
- Repackaged procedures and initiatives
- Designing new activities where gaps are perceived

Common Vocabulary
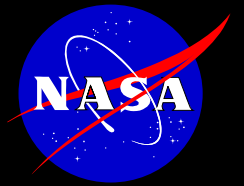
- Establish generic WBS for SEBs
  - Utilize in preparing generic master schedule template
  - Build a WBS dictionary over time, providing common definition for SEB-related terms
- Provide starting point for common documents
  - Templates for PSM, Comp Range, Source Selection
  - Do not provide "cold" to SEBs, provide with advice
  - Emphasize that a template is a starting point, not the end
- Build vocabulary through exposure
  - Common training, both basic SEB class and just-in-time training modules
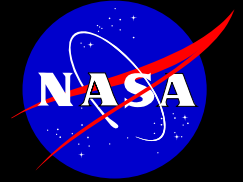
- In order to include reviewers (procurement and legal) in the "team," need to consider imbedded reviewers
  - Dependent on reviewer resources
  - For JSC Acquisition Planning and Advisory Team (APAT), we are attempting to establish one person that is assigned to an SEB, but not imbedded

- Well defined responsibilities enhances the growth of mutual respect
  - Activity underway to define the roles and responsibilities of reviewers in the JSC procurement process
  - Carefully define the standards for SEB products: Findings, Reports, Presentations
    - Good initial product reduces review time, increases respect on both sides of the review process
    - Tailor training packages and templates to emphasize product standards
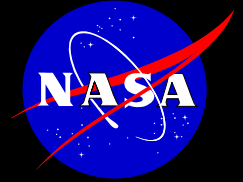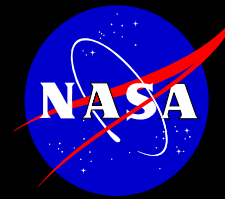
- Make Chairs aware of the SEB cycle – A Series of Gates
  - Accomplished through the master schedule template and WBS, which are major milestone-based
  - APAT counseling emphasizes both upcoming major milestone and how it fits into overall cycle
- JSC has established new joint HQ/JSC concurrent review board for major SEB documents (Senior Advisory Review)
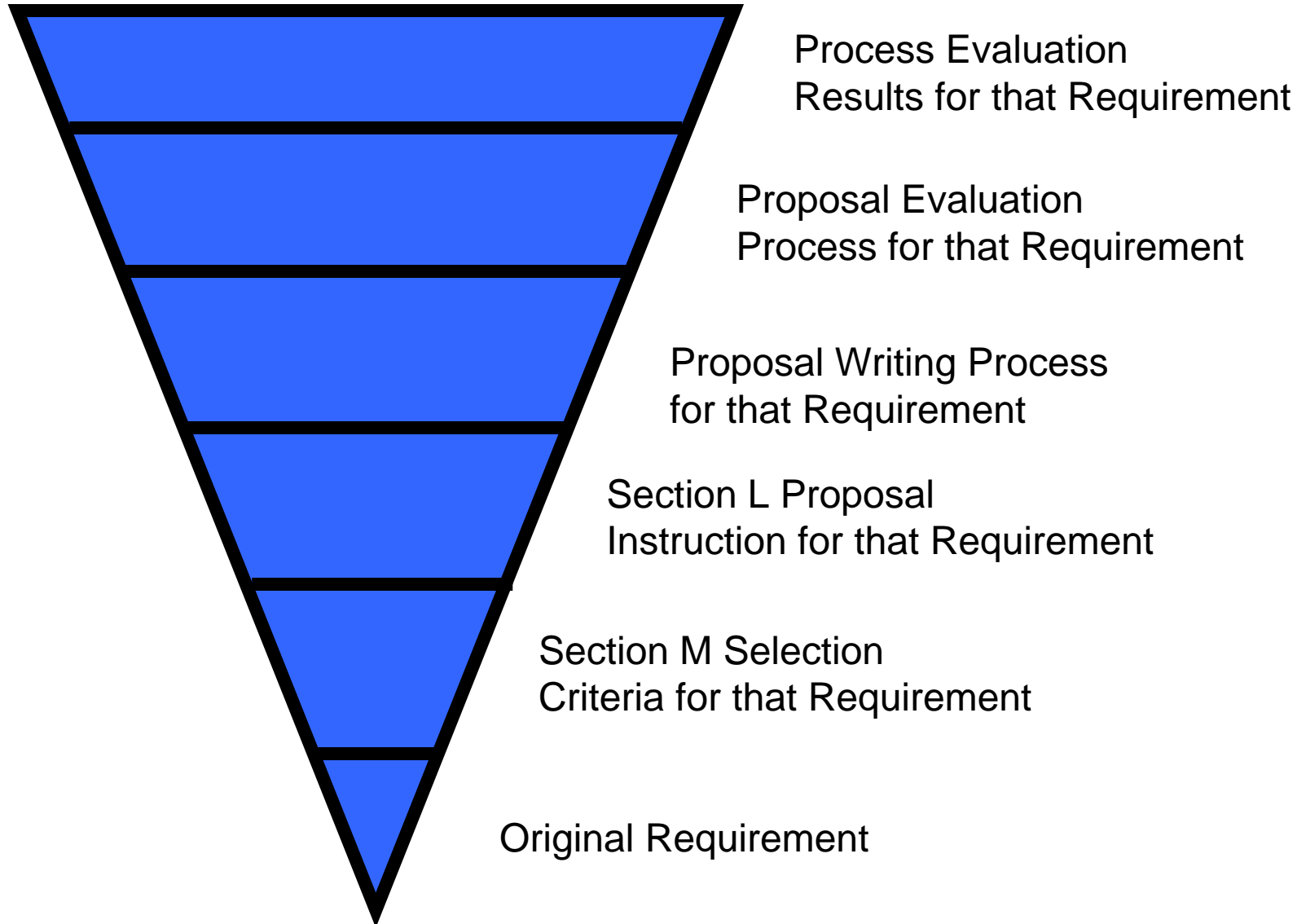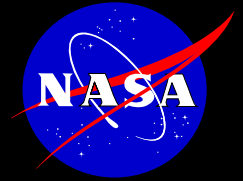
- For most source selections, the three most important things to remember are requirements, Requirements, REQUIREMENTS!
- Requirement definition needs to begin earlier and demand more attention
- Historically, the majority of schedule slips in SEBs occur at the beginning of the process, during requirements definition
- Greater understanding of your need leads to
  - Better understanding of the contractor you want
  - Better definition of discriminators, that leads to better Section M
  - That leads to a focused, compact Section L and resulting proposals
  - Providing faster evaluation, review and selection.
- To increase focus on this at JSC, we are establishing Requirements Development Teams (RDT) to address this critical issue earlier.
- Using new Roadmap from SOMD/ESMD to assist in managing early stages of requirements planning
- Considering training of procurement personnel in Systems Engineering basics to allow us to "sling the lingo" with our customers in this area
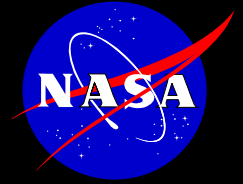
Multiplier Effect of Good Requirements

Process Evaluation
Results for that Requirement

Proposal Evaluation
Process for that Requirement

Proposal Writing Process
for that Requirement

Section L Proposal
Instruction for that Requirement

Section M Selection
Criteria for that Requirement

Original Requirement

- Use master schedule template as starting point for new SEBs
  - APAT assists in customizing schedule for individual boards
  - Point out common bottlenecks on schedule
- Common WBS provides resource planning for scarce resources (reviewers)
- Routine reviews with Chairs maintain focus on current schedule performance and awareness of upcoming bottlenecks
- This consistent approach to schedule will also yield detailed performance data for future analysis of the SEB process, permitting next wave of initiatives
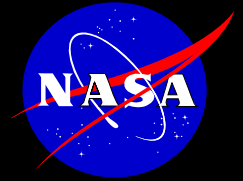
- Blatantly "leveraging" from NASA best practices:
  - Utilizing Acquisition Evaluation Software (AES) developed at Goddard for evaluation tool (to replace FedSelect)
  - Utilizing Acquisition Planning Tool (APT) developed at Marshall to provide greater information earlier to industry planners
- Increased staffing to APAT, emphasizing counseling and guidance role as a resource to SEB Chairs and COs
- Established team web site to keep APAT activities consistent across SEBs
- APAT calendar to assist reviewers in planning scarce resources
- Strategic planning for logistics to SEB facilities
  - IT (printers, projectors, MS Project)
  - Upgrades to facilities (currently have 5 SEB buildings)
  - Applying consistent approach to logistics across all facilities
- Integrate existing RBAM activities more closely to the project's Risk management activities